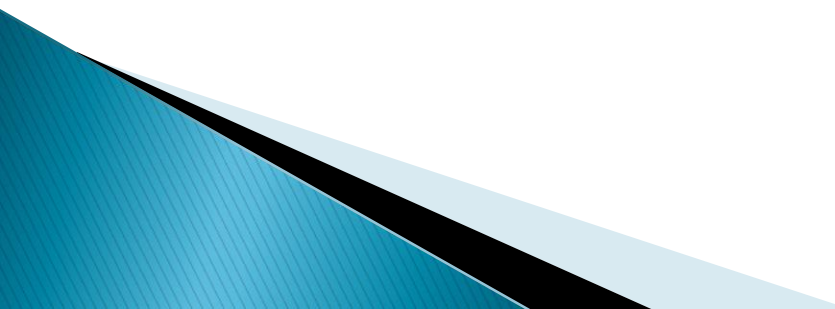




# PlatinumPay Xpress

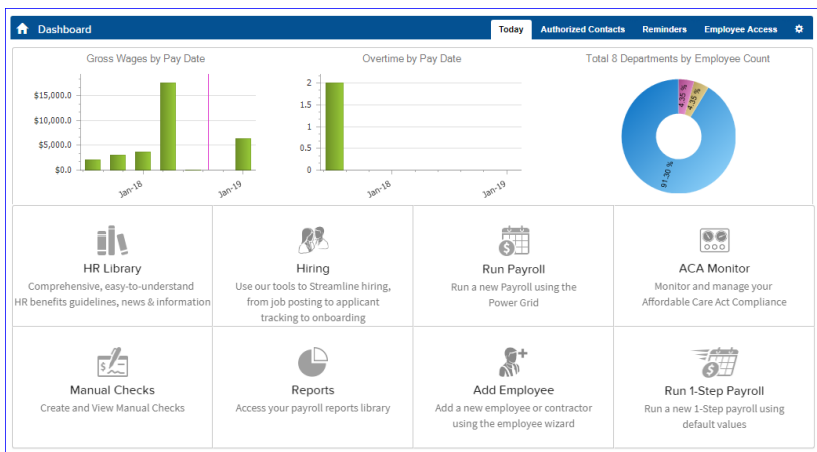
Adding a New Employee

# Contents

- Adding New Employees
  - Primary Info
  - Payroll Info
  - Tax Info
  - Additional Fields
  - Pay History
- 

# ▶ Adding New Employee from Dashboard

When selecting the Add Employee tile from the dashboard a quick set up will appear requesting employee information. All fields are required to process payroll accurately.



### ADD NEW EMPLOYEE

First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Gender:*	<input type="text"/>	SSN:	<input type="text"/>
DOB:	<input type="text"/>	Start Date:	2/14/2019
Street:	<input type="text"/>	Zip:	<input type="text"/>
City:	<input type="text"/>	State:	<input type="text"/>
Division:*	<input type="text"/>	Department:*	<input type="text"/>
Federal Status:*	<input type="text"/>	Default State:*	<input type="text"/>
Federal Dependents:	0	Rate1:	0.0000
Salary:	\$0.00	Employee Type:*	Regular

New Employee-ID #

# Primary Info

- ▶ Personal
- ▶ Status
- ▶ Pay
- ▶ Notes
- ▶ Reminders
- ▶ Paid Time Off

David Great [888747] All Employees Primary Info Payroll Info HR Tax Info Additional Fields Pay History

### PERSONAL

**David The Great**

Emp ID: [888747]  
Work Phone:  
Work Email:

Gender: UnSpecified Address:  
SSN: XXX-XX-9123 City: West Chatham  
Zip: 02669 State: MA  
Birthdate: 6/6/1967 Email:  
Work Phone: Home Phone: ()-508  
Cell Phone: Work Email:

### PAY

Rate 1: 20.0000 Effective Date: 12/3/2018  
Rate 2: Effective Date:  
Rate 3: Effective Date:  
Salary: Effective Date:  
Default Hours: 40.00 Accrual Plan: Full-Time  
Pay Frequency: Weekly  Include in Time & Labor

### JOB

Division: 0 - Default Start Date: 11/14/2018  
Department: 1 - Operations Last Paid: 12/5/2018  
Position: Term Date:  
Job 1: Job 2:  
Workers Comp: Title:  
Managed By:

### STATUS

Job Status: Full-Time New Hire: N/A  
Pay Status: Hourly  Seasonal  
ACA Status:  Temporary  
Type: Contract

### PAID TIME OFF

	Sick Time	Vacation Time	Personal Time
Earned	0.00	0.00	0.00
Used	0.00	0.00	0.00
Available	0.00	0.00	0.00

Primary info has six tiles you can edit from it will allow you to make changes to the employees profile.

Personal Tile: Name, gender, contact info, DOB, SSN and photo if desired.

Status: You're going to find full time, part time status, pay type, ACA and seasonal/temporary fields.

Pay: Employee will either be hourly or salary. And from here select pay frequency; weekly bi-weekly, monthly...

Job: Here you can set up/change divisions, departments, start and termination dates

Paid Time Off: You'll notice tracking for vacation/sick or PTO days, however accruals will need to be set up on the client level first.

# Payroll Info

- ▶ Scheduled Earnings
- ▶ Scheduled Deductions
- ▶ Direct Deposit
- ▶ Time & Labor

SCHEDULED EARNINGS +					SCHEDULE DEDUCTIONS +				
Earning	Category	Amount	Rate	#	Deduction	Ded. Calc.	Amount	#	#
6-Other Earnings	No Exemptions	\$200.00	0.0000		7-Garnishment	Flat Amount	\$0.00		

DIRECT DEPOSIT				
	First Account	Second Account	Third Account	Fourth Account
Account Type:	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	<input type="text" value="None"/>
Bank Routing #:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employee Acct. #:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Split Method:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Amount:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DD Status:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

TIME & LABOR	BENEFITS CONNECT		
	Name	Value	#
Company is not setup for any Time & Labor Service.	This employee is not setup for Benefits Connect		

Scheduled earnings code, this is where you would want to describe the type of pay the employee is receiving. A good example would be your w4 employee would be classified as regular pay where as a contractor could be set up as a 1099 pay code. Pay codes can be created to what-ever you'd like they would first be created on the client level first which the payroll specialist would take care of first.



SCHEDULED EARNINGS <span style="float: right;">+</span>				
Earning	Category	Amount	Rate	#
6-Other Earnings	No Exemptions	\$200.00	0.0000	 

- ▶ Scheduled Deductions, this area will allow you to select different deductions and deductions can either be voluntary (health, medical/dental, 401K) and also involuntary deductions (Levy's, child support or other types of garnishments.) This section is also created on the client/employer level first once it's complete options will become available for the employee.
  - >Select type of deduction
  - >select type of calculation for deduction:  
Percent/Flat amount
  - >select amount: whole dollar amounts or percentages  
ie: 401K can either be flat amount of \$100.00 per pay period or 3% of gross which would be .03And don't forget to save progress.



SCHEDULE DEDUCTIONS				
Deduction	Ded. Calc.	Amount	#	#
7-Garnishment	Flat Amount	\$500.00		



**Direct Deposit:** Employees can have up to 4 direct deposit accounts on file. Preferred order for deposits should be smallest to largest and always last account should be remaining 100%

Example: 1<sup>st</sup> savings \$20, 2<sup>nd</sup> 100% – thhe remaining needs to be 100% of what's left over from the paycheck. If they are selected for percent, those rules would follow as well  
1<sup>st</sup> checking 5% 2<sup>nd</sup> 90% 3<sup>rd</sup> 4% 4<sup>th</sup> always 100% of what's left over.

\* Please follow up with payroll specialist to activate direct deposits\*

DIRECT DEPOSIT				
	First Account	Second Account	Third Account	Fourth Account
Account Type:	Savings	Checking	None	None
Bank Routing #:	111111111	222222222	Bank Routing #3	Bank Routing #4
Employee Acct. #:	222222222222	111111111		
Split Method:	Flat Split	Percent Split		
Amount:	\$20.00	100.00%	\$0.00	\$0.00
DD Status:				

# HR

This splits into sub tabs; Classification, Administration, Contacts, Education, History. This serves as an HR resources to keep information the employer may seem vital to the employee.

Classification Administration Contacts Education History

**CITIZENSHIP**

Country:

Visa:

Expires On:

I-9:

Expires On:

Passport:

Expires On:

**CLASSIFICATION**

Classification:

New Hire: N/A

Send Date:

Title:

Corporate Officer

Statutory Employee  W2 Pension Box

Smoker  Disabled

**VET 100**

Military Veteran  Disabled Veteran

Vietnam Veteran  Active Reserves

Veteran Others  National Guard

**EEO**

EEO Code:

Ethnicity:

Gender: UnSpecified

# HR

**EMERGENCY CONTACTS** +

Name	Relationship
No data to display	

Relationship:  Priority:

Name:

Address:

City:  State:  Zip:

Home Ph:  Cell Ph:

Work Ph:  Ext:  Pager:

Email:

Notes:

- ▶ The Education Tab has three tabs with in; Education, Training, Skills

**EDUCATION** +

School	Grad Year
No data to display	

School:

Type:

Major:  Degree:

Required Status:

Graduated Grad Yr:  # of Yrs:  Grade:

Paid For Total Cost:  Total Paid:

Account:

Notes:

TRADING

**TRAINING** +

Training	Location
No data to display	

Training:

Location:

From:  To:  Status:

Required  Completed Grade:

Valid Thru:  Renewal Frequency:

Paid For Total Cost:  Total Paid:

Account:

Notes:

**SKILLS** +

Skill	Start Date
No data to display	

Skill:

Start Date:

Required

Notes:

# Tax Info

This is where the federal, state, local and any eligible work states will be set up. Eligible work states have to be set up via our tax department, after the company has set up an account with that particular state.

### FEDERAL TAXES

Federal W/H Exempt:

Federal Status:

Federal Allowances:

Extra Federal W/H:

Fixed Federal W/H:

AEIC Status:

### STATE TAX

SUI Exempt:

State for Unemployment Taxes:

Primary Work State:

Primary Residence State:

### LOCAL TAXES

Local ID	State	Local Description	Position#	Active	#
No Locals Found! Add New Local?					

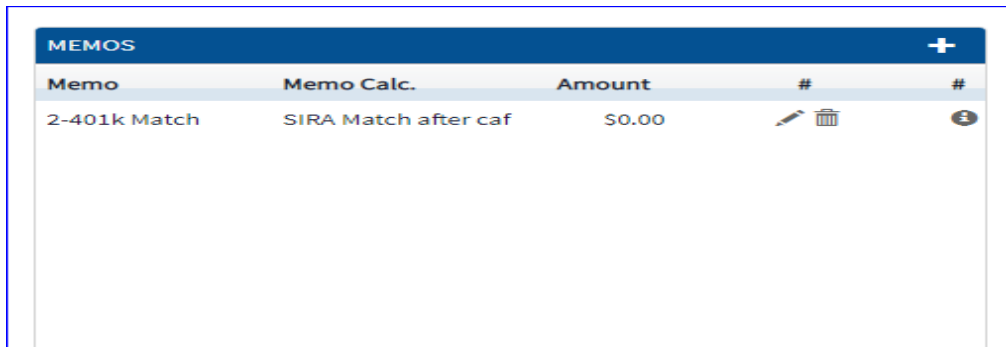
### ELIGIBLE WORK STATES

State	State Tax Info
Connecticut (CT)	Settings

[Add State](#)

# Additional Fields

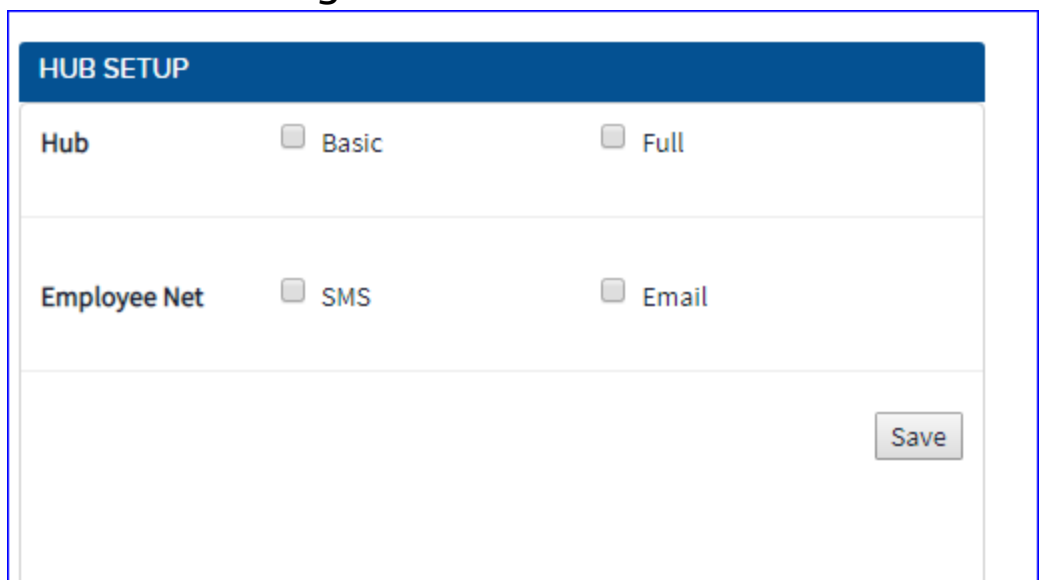
–Memos: This field does not effect an employees net pay. IE: Safe Harbor Match–a memo that tells the employee that their employer is matching.



The screenshot shows a table titled "MEMOS" with a blue header bar containing a plus sign. The table has five columns: "Memo", "Memo Calc.", "Amount", "#", and "#". A single row is visible with the following data: "2-401k Match", "SIRA Match after caf", "50.00", and two columns containing edit and delete icons. A third column with an information icon is also present.

Memo	Memo Calc.	Amount	#	#
2-401k Match	SIRA Match after caf	50.00		

–HUB: Allows an admin to set up an employee for basic/full and an email or text message for their net amount

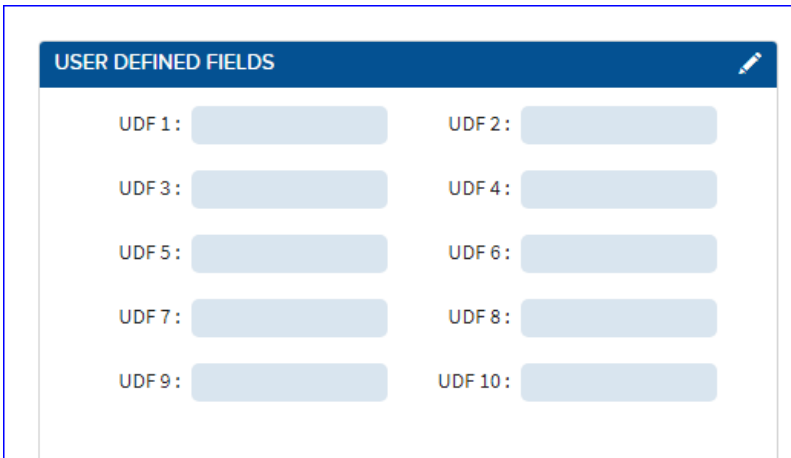


The screenshot shows a form titled "HUB SETUP" with a blue header bar. The form is divided into two sections. The first section, labeled "Hub", contains two checkboxes: "Basic" and "Full". The second section, labeled "Employee Net", contains two checkboxes: "SMS" and "Email". A "Save" button is located at the bottom right of the form.

Hub	<input type="checkbox"/> Basic	<input type="checkbox"/> Full
Employee Net	<input type="checkbox"/> SMS	<input type="checkbox"/> Email

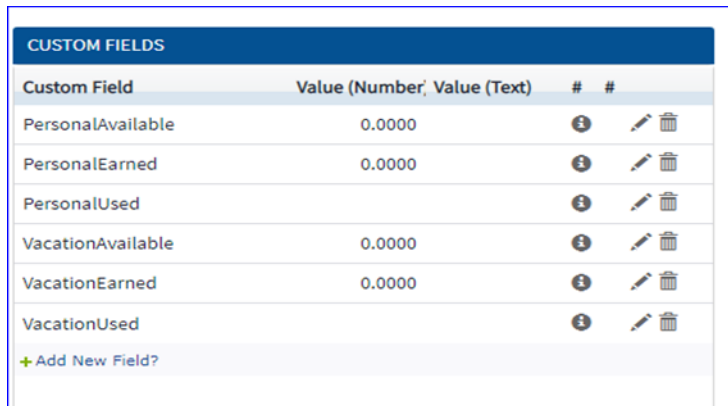
# Additional Fields

- ▶ User Defined Fields: This feature can be used for what-ever tracking an employer would like to keep on an employee. IE: Parking lots/assigned spaces, an employer can request license plate #s to hold in that field. Any type of tracking the employer chooses can be used in this field.



The screenshot shows a window titled "USER DEFINED FIELDS" with a blue header and a pencil icon in the top right corner. Below the header, there are ten input fields arranged in two columns. The left column contains fields labeled UDF 1 through UDF 9, and the right column contains fields labeled UDF 2 through UDF 10. All fields are currently empty.

- ▶ Custom Fields: Can track/change accruals

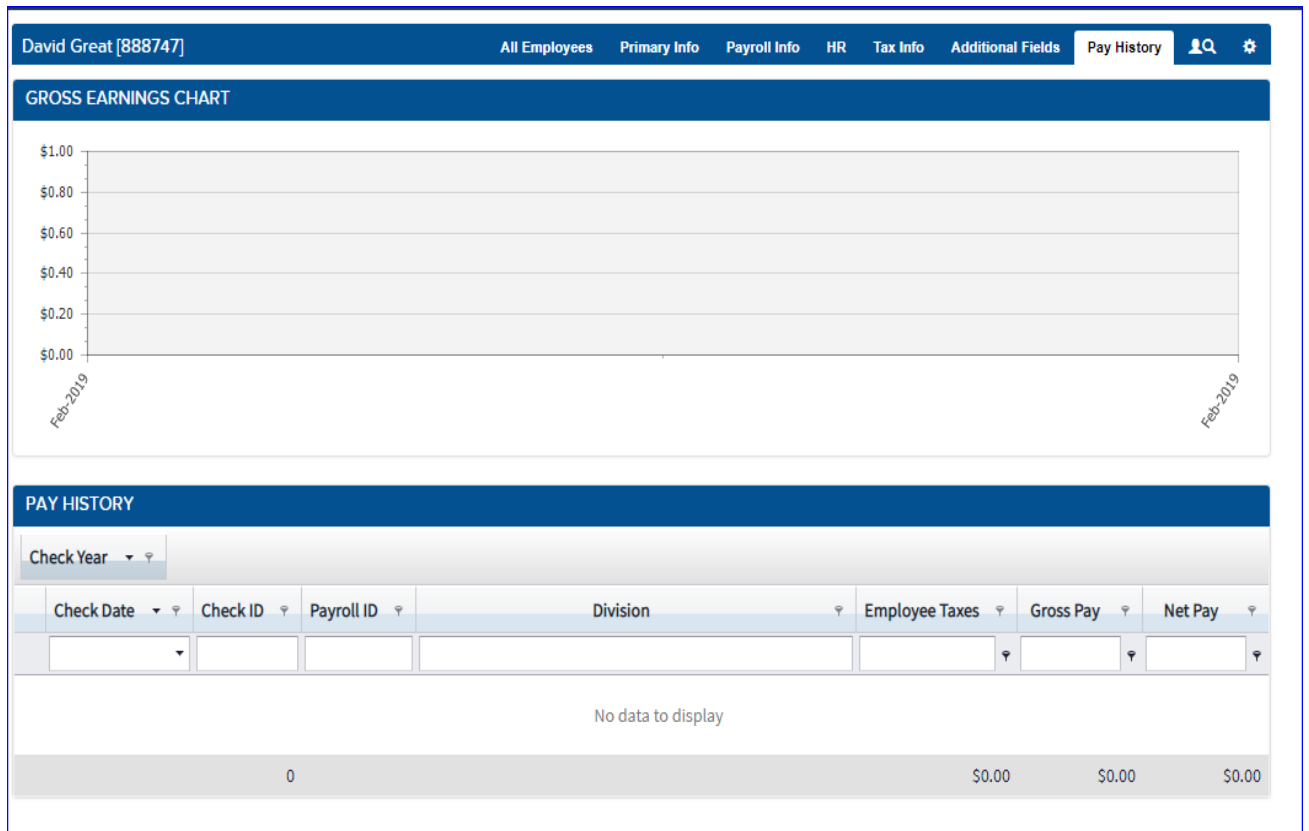


The screenshot shows a table titled "CUSTOM FIELDS" with a blue header. The table has four columns: "Custom Field", "Value (Number, Value (Text)", "#", and "#". The table contains several rows of data, each with a field name, a value of 0.0000, and two icons (a dollar sign and a trash can). At the bottom of the table, there is a link that says "+ Add New Field?".

Custom Field	Value (Number, Value (Text)	#	#
PersonalAvailable	0.0000	\$	🗑️
PersonalEarned	0.0000	\$	🗑️
PersonalUsed		\$	🗑️
VacationAvailable	0.0000	\$	🗑️
VacationEarned	0.0000	\$	🗑️
VacationUsed		\$	🗑️
+ Add New Field?			

# Pay History

- ▶ Employers can view gross earnings per employee, and their history of pay as well.



# Notes

- ▶ You can also add a new employee when you select Employee along the top of the dash board. Your active list of employee will pop up to the right of the list you'll select +Add Employee and your quick set up box will appear.
- ▶ Also you can show terminated employees, sort by last name, first, department, division or employee ID
- ▶ You can search for employees by hitting the person and magnify glass and log off the system by hitting the cog wheel

